



DELAINE EASTIN
State Superintendent of Public Instruction

**CALIFORNIA
DEPARTMENT
OF
EDUCATION**

721 Capitol Mall

P.O. Box 944272

Sacramento, CA

95844-2720

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To: County Superintendents of Schools, County Auditors, and County Treasurers

From: Janet Sterling, Director
School Fiscal Services Division

Subject: 2000-01 Advance Apportionment

This letter is to advise you of the Advance Apportionment for elementary, high, and unified school districts, charter schools and county offices of education for the 2000-01 fiscal year. The funding level of the programs is determined in accord with the 2000-01 Budget Act and implementing legislation. The total General Fund state aid Advance Apportionment is \$19,172,967,491.

As provided in *Education Code* Section 41330, the 2000-01 Advance Apportionment is based on the 1999-2000 Second Principal (P-2) Apportionment, which is then increased to reflect estimated growth and inflation. This apportionment also includes funding to eliminate the revenue limit deficit factor.

Because the Advance Apportionment is developed using past year state aid amounts, and estimated 2000-01 growth rates in attendance or other growth factors, local educational agencies (LEAs) will be apportioned in the months July through January either more or less than their final actual entitlement would have provided for that same period. The difference will be resolved through updates at the subsequent 2000-01 First, Second, and Annual Apportionments. LEAs should budget accordingly.

Enclosed are the calculations for the Advance Apportionment, Exhibits B, C and M, and a list of the staff of the School Fiscal Services Division (SFSD) to assist you if you have questions regarding the apportionment.

For your convenience, a copy of this letter and Exhibits B and C are available on SFSD's Internet web site under Principal Apportionments at www.cde.ca.gov/sfsdiv/.

Calculation of the 2000-01 Advance Apportionment

The Advance Apportionment for 2000-01 is based on a statutory derivation pursuant to *Education Code* sections 14002 through 14007 and 41301. The following provides specific detail regarding the calculation of funding for each program.

School District Revenue Limits

The state aid portion of the revenue limit for each district was calculated using the most current estimates from the California Department of Finance. The total 1999-00 P-2 amounts for each district were adjusted as follows:

1. The deficit factor applied to revenue limits and hourly rates for summer school, pupil promotion and retention, and elementary intensive reading was eliminated.
2. The 1999-2000 P-2 class size penalties were removed from the P-2 apportionment.
3. The amounts received for summer school (core and proficiency), pupil promotion and retention (mandated and non-mandated), elementary intensive reading, apprenticeship, community day school, and basic aid transfers (SB 937) were subtracted from the total state aid calculated at P-2.
4. A factor of 1.04437233 was applied to the remaining P-2 state aid amounts for each school district. (Basic aid districts receive no increase to the state aid portion of the revenue limit.)
5. The P-2 amounts for summer school (core and proficiency), pupil promotion and retention (mandated and non-mandated), elementary intensive reading, and community day school was increased by a cost-of-living adjustment (COLA) factor of 1.0317 and added to the adjusted state aid portion of the revenue limit.
6. The P-2 amount for apprenticeship education was added to the adjusted state aid portion of the revenue limit.

County Offices of Education

The apportionment for county superintendents was developed using the most current estimates from the California Department of Finance and the 1999-2000 P-2 state aid as a base. The state aid portion of the 2000-01 Advance Apportionment was calculated as follows:

1. The deficit factor applied to revenue limits was eliminated.
2. The P-2 state aid portion of the revenue limit calculated for each county was reduced by the amounts received for special education flow-through, county community school, apprenticeship, summer school, adult education, and community day school.
3. A factor of 1.205311 was applied to the remaining P-2 state aid.
4. The P-2 amounts for special education flow-through, county community school, summer school (core),

adult education, and community day school were increased by a COLA factor of 1.0317 and added to the adjusted state aid portion of the revenue limit.

5. The P-2 amount for apprenticeship education was added to the adjusted state aid portion of the revenue limit.

Charter School Funding Model

The apportionment for charter schools funded through the charter school funding model was developed using the most current estimates from the California Department of Finance and the 1999-2000 P-2 state aid as a base. The state aid portion of the 2000-01 Advance Apportionment for each charter school was calculated as follows:

1. A factor of 1.12483743 was applied to the P-2 state aid amount for each charter school.
2. The P-2 amount for summer school was increased by 1.0317 and added to the adjusted state aid amount. This is applicable only to those charters that were funded directly at P-2. Summer school funding is included in the advance apportionment of the authorizing district for each eligible charter school that was funded locally at P-2.
3. The apportionment includes the categorical block grant funding which was based on P-2 ADA and disadvantaged pupil counts. The 1999-00 per-ADA rates were increased by a factor of 1.1783 as provided by the California Department of Finance. The 1999-00 in lieu of EIA funding provided to eligible charter schools was increased by 1.0317. The adjusted per-ADA and in lieu of EIA funding amounts were combined and added to the adjusted state aid amount.

The apportionment does not include categorical block grant funding for charter schools that made the election to be funded via the funding model in the 2000-01 fiscal year. These charter schools will receive categorical block grant funding at the 2000-01 First Principal Apportionment (P-1) based on current ADA and disadvantaged pupil counts reported for that period.

Special Education Allowances

The apportionment for the Special Education program was prepared using the 1999-2000 P-2 Apportionment as a base. The following factors were multiplied by the base to calculate the state aid portion of the Special Education Apportionment.

1. A factor of 1.0993133076899 was used for the AB 602 Special Education Ages 3-21 Program.
2. A factor of 1.0811179320904 was used for the Special Education Infant Ages 0-2 Program.

Handicapped Pupils Attending ROC/Ps

The apportionment for Handicapped Pupils Attending ROC/Ps was developed using the 1999-2000 P-2 Apportionment for each district and county as a base. The amount for each district and county was increased by a factor of 1.0317.

Gifted and Talented Education (GATE)

The apportionment for GATE was developed using the 1999-2000 P-2 Apportionment as a base and applying a factor of 1.04665228523. Districts new to the program in 2000-01 are not included in this apportionment. They will receive funding beginning with the P-1 Apportionment in February 2001.

Adult Education Block Grant

The apportionment for the Adult Education Block Grant was developed using the 1999-00 P-2 Apportionment data as a base. The amount for each district was increased by a factor of 1.11139.

Regional Occupational Centers and Programs (ROC/Ps)

The apportionment for ROC/Ps was developed using the 1999-2000 P-2 Apportionment amount for each district and county office as a base. The amount for each district and county was increased by a factor of 1.078906.

Beginning Teacher Salary Adjustment

The apportionment for the beginning teacher salary adjustment was developed using the amounts from the Jack O'Connell Beginning Teacher Salary Incentive Program apportionment dated May 24, 2000 as a base. The amount for each district and county office was increased by a factor of 1.0457.

Schedule of Controller's Warrants Through January 2001

School Districts Other Than Districts with Less Than 5,000 ADA in 1979-80 and 39 Percent or More of Total Revenue Limit from Local Taxes in 1979-80, and Classes Maintained by County Superintendents
Education Code Section 14041(a)(2) provides that the warrants from the State Controller for amounts allowed to school districts and county school service funds for classes maintained by the county superintendent of schools and to county tuition funds shall be equal to 6 percent in July, 12 percent in August, and 8 percent in September, October, November, December, and January of the amount certified as the Advance Apportionment.

School Districts with Less Than 5,000 ADA in 1979-80 and 39 Percent or More But Less Than 75 Percent of Total Revenue Limit from Local Taxes in 1979-80

Education Code Section 14041(a)(7) provides school districts, which in 1979-80 received 39 percent or more (but less than 75 percent) of their total revenue limit from local taxes and had less than 5,000 ADA, to receive 15 percent in July, August, September, and October, zero percent in November and December, and 6 percent in January of the amount certified as the Advance Apportionment. Districts which qualified under *Education Code* Section 14041(a)(7) are identified in Exhibit C by an asterisk (*) in the Total Column on the right side of the page.

School Districts with Less Than 5,000 ADA in 1979-80 and 75 Percent or More of Total Revenue Limit from Local Taxes in 1979-80

Education Code Section 14041(a)(8) provides school districts, which in 1979-80 received 75 percent or more of their total revenue limit from local taxes and had less than 5,000 ADA, to receive 15 percent in July, 30 percent in August and September, 15 percent in October, zero percent in November and December, and 6 percent in January of the amount certified as the Advance Apportionment. Districts which qualified under E.C. Section 14041(a)(8) are identified in Exhibit C by two asterisks (**) in the Total Column on the right side of the page.

Division Staff Contacts for Apportionment Questions

Manager - Principal Apportionment Unit

Katherine Ely.....(916) 322-5906 (kely@cde.ca.gov)

Adult Education Revenue Limits

Karen Allen-Hudson.....(916) 324-4538 (kallen@cde.ca.gov)

Charter Schools

Cindy Chan.....(916) 322-5101 (cchan@cde.ca.gov)

County Office Attendance (J-27/28), CSSF Revenue Limits

Patty Eid.....(916) 324-4540 (peid@cde.ca.gov)

County Office Tax Amounts (J-29C)

Patty Eid.....(916) 324-4540 (peid@cde.ca.gov)

Community Day Schools

Terri Emery(916) 324-4551 (temery@cde.ca.gov)

Gifted and Talented Education (GATE) (J-22 Supplement)

Daphne Kelley(916) 324-6178 (dakelley@cde.ca.gov)

ROCP Revenue Limits

Karen Allen-Hudson.....(916) 324-4538 (kallen@cde.ca.gov)

ROCP Handicapped (J-22)

Martin Kleinke.....(916) 322-5091 (mkleinke@cde.ca.gov)

School District Attendance (J-18/19)

Terri Emery(916) 324-4551 (temery@cde.ca.gov)

School District Revenue Limits

Karen Allen-Hudson.....(916) 324-4538 (kallen@cde.ca.gov)

School District Tax Amounts (J-29B) and Miscellaneous Funds (J-29.1)

Halena Le.....(916) 324-4535 (hle@cde.ca.gov)

Manager - Special Education Unit

Judy Johnson.....(916) 323-5185 (jjohnson@cde.ca.gov)